

# SFA Modernization Partner Management Services Summary

May 10, 2000

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## **1.0 Program Status**

### **1.1 Introduction**

This Management Services Summary is being produced as a deliverable of the SFA Modernization Partner Task Order. This report covers the month of April 2000 and includes information on the overall status of the Program, a summary of key Program Risks, achievements for the month, planned work for the next month, and performance of the Program against schedule.

The format and content of this report are based on the guidelines provided in the FY2000 Program Management Task Order, standard project status reporting techniques, and input from SFA management personnel. The purpose of this report is to provide SFA senior management with information related to the performance of the Modernization Program team.

These monthly summaries will be refined to improve their usefulness and the value they provide. Please address any suggestions regarding the content or format of these reports to the Modernization Program Office Manager ([elisabeth.s.schmidt@ac.com](mailto:elisabeth.s.schmidt@ac.com) or 703.947.2644).

## 1.2 Program Overview

### Program Status

In the month of April, the Program team has delivered some key deliverables:

- **Program Management Office**
  - Acquisition Strategy Update*
  - Monthly Program Report*
- **Financial Management System Design**
  - Business Case*
  - Implementation Plan*
- **Organization Transformation**
  - Schools Organizational Approval Package*
  - Schools Communications on Wave 2 Implementation*
  - Position Descriptions (PD's) for Analysis Group*
  - Position Descriptions for SFA University*
  - Documentation of SFA Management-Union Involvement Throughout Transformation*
- **Portals/Ombudsmen/EEIT**
  - Analysis Data Summary Report*
  - CRM Vendor Recommendation Report*
  - Implementation Plan for Installing CRM*
  - Final Project Status Report*
  - Internet Design Package*
  - Intranet Technical Architecture Acquisition Matrix*
  - SFA Intranet Release 1*

### **Program Management Office:**

*Acquisition Strategy Update* provides guidance to the SFA Modernization Program for resourcing the reengineered business processes in order to achieve performance-based objectives. The objective of this strategy is be outcome oriented and to improve systems.

*Monthly Program Report* for March 2000 is a summary of the Program's accomplishments for the month and the risks/issues that require the client's action or attention.

### **Financial Management System Design:**

The SFA FMS *Business Case* describes four phases which will establish incremental benefit, mitigate risk and satisfy JFMIP, PBO and Blueprint requirements. The FMS *Implementation Plan* includes the work plan and the final deliverable/working product list.

### **Organization Transformation:**

*Schools Organizational Approval Package* contains organizational approval materials for the Schools channel. It was submitted to the Department's Human Resources Group for formal approval. This enables the school's channel to formalize new positions and post new job descriptions.

*Schools Communications on Wave 2 Implementation* are materials drafted with Schools leadership which communicate the status of Wave 2 Implementation to employees.

*Position Descriptions (PD's) for Analysis Group* are descriptions of critical new positions in the Analysis area.

*Position Descriptions for SFA University* are descriptions of critical new positions within SFA University.

*Documentation of SFA Management-Union Involvement Throughout Transformation* describes SFA Management-Union participation to date as part of SFA's transformation process.

### **Portals/Ombudsman/EEIT:**

*Analysis Data Summary Report* (Ombudsman – 11. 1.1) analyzes data extracted from the Ombudsman case tracking system and other SFA data sources. This includes an outline of data analysis requirements.

*CRM Vendor Recommendation Report* (Ombudsman – 11.1.2) documents the selection results including Ombudsman system requirements, evaluated vendors and the rationale for the selection, vendor evaluation criteria, meeting notes and recommendations.

*Implementation Plan for Installing CRM & Conversion from the OCTS* (Ombudsman – 11.1.3) contains all activities and resources required for installation and testing of the CRM package including project plans, resource requirements and key milestones and timeframes. It also includes a Conversion Plan which addresses data conversion, agent training, and migration from existing systems.

*Final Project Status Report* (Ombudsman – 11.1.4) provides an overview of project activities and results, and it includes copies of bi-weekly status reports.

*Intranet Design Package* (Intranet – 9.1.1) contains requirements grouped by release for each line of business. Three documents included are: a functional requirements matrix, a content design chart, and a content plan for Release 1.0.

*Intranet Technical Architecture Acquisition Matrix* (Intranet – 9.1.2) provides a comprehensive list of products to be acquired for the build and operation of the SFA Intranet. The matrix will include the acquiring organization, the delivery schedule and the cost.

*SFA Intranet Release 1* (Intranet – 9.1.3) is an operational intranet site that meets Release 1 requirements for design and content. The web pages included will be the SFA home page, CIO home page and SFA communications home page.

### **1.3 Value Points**

- Organization Transformation helped SFA move closer to completing “Wave 2” organization design and approval, allowing SFA to align new job functions and positions with goals of the PBO.
- Financial Partners Transformation conducted the first round of visioning workshops with Barry Morrow and the Financial Partners (FP) direct reports in an effort to set the strategic direction for the FP Transformation effort.
- Portals delivered a functioning Intranet site of preliminary pages and continued building the site in preparation for production rollout. This created a communication capability previously not in place for SFA employees.
- Portals delivered the Ombudsman March Report and moved from the planning to the delivery of an enhanced CRM package (Seibel) which supports a tracking capability of all Ombudsman related contacts.
- Program Management Office introduced new reporting requirements to the program. These requirements will increase the quality of the information presented to SFA and ensure that the appropriate issues and risks are elevated to the client for their action and/or attention.
- SFA Modernization Blueprint describes the business requirements, business and technical architecture, and sequencing plan that the Office of Student Financial Assistance (SFA) will use to transform the SFA system using leading edge technology. The Blueprint is just the first step in an on-going process. These elements provide the focus, framework, and actions needed to make the SFA vision a reality.
- The SFA Sequencing Plan is a roadmap for our journey from yesterday’s way of doing business to the future’s target architecture. It describes how we’ll make changes, when we will implement these changes, and who will benefit from them.

## **2.0 Master Schedule**

### Major Schedule Changes

The following Gantt chart provides a schedule of the planned initiatives and deliverables for the Modernization program that are in progress.



### 3.0 Summary Of Program Risks & Issues

#### 3.1 Program Risks

Area	Description	Mitigation Strategy	Ability To Control
<b>HIGH SEVERITY</b>			
Financial Management System Design (FMS)	A conceptual model of the FMS interaction with channel systems and processes (both legacy and “To-Be”) needs to be coordinated with changes in business processes within the channels. The business process design projects are on differing schedules, and may not be completed in synch with FMS pilot.	<ul style="list-style-type: none"> <li>• Cross channel coordination and communication to be included in an overall communication strategy.</li> <li>• Change management consultant deployed full time to FMS.</li> <li>• CFO leadership preparing to discuss the program with each GM.</li> </ul>	Medium
<b>MEDIUM SEVERITY</b>			
Technical Architecture Portals	A schedule risk exists for IFAP and School Portal due to delays in software and hardware procurement and the finalization of requirements from the school channel.	<ul style="list-style-type: none"> <li>• Continue to work aggressively across the team to accelerate schedules and confirm software and hardware configurations and requirements</li> </ul>	Medium
Financial Management System Design (FMS)	Technical Infrastructure has not been made available to all FMS developers; this impacts our ability to conduct development in the VDC environment.	<ul style="list-style-type: none"> <li>• Continue focused follow-up to confirm exactly when additional team members obtain access to the VDC environment.</li> </ul>	High

### 3.2 Program Issues

Area	Issues	Proposed Solution
Technical Architecture Portals	Procurement of Software was delayed due to discussion around acquisition approach, risking delay to project activities requiring software.	<ul style="list-style-type: none"><li>• Push forward on software configurations and pricing aggressively</li></ul>
Technical Architecture Portals	Schools Portal scope needs to be further refined to ensure that integration (coming back to the portal) from other schools systems is possible. We are still investigating the application architecture for the 5 top systems.	<ul style="list-style-type: none"><li>• Meeting with system owners to understand application architectures</li></ul>
Technical Architecture Portals	Task order changes and bundling are delaying completion of the task orders.	<ul style="list-style-type: none"><li>• Finalize task order to contain effort. Develop modification for missing components.</li></ul>
Organization Transformation	The union resistance to SFA reorganization submissions are causing a major delay in implementing the PBO.	<ul style="list-style-type: none"><li>• Solicit assistance from Bob Tobias, former Treasury union president, to facilitate dialog.</li></ul>
COD	Recent changes to SFA management's plan for COD requires changes to the scope of our initial draft task order.	<ul style="list-style-type: none"><li>• Submit TO19 and modify when a specific scope can be defined and then estimated.</li></ul>







#### 4.0 Modernization Program Scorecards

The following scorecards provide summary status of each of the critical program management areas. The Modernization Program Summary Scorecard is an aggregate assessment of program performance. The scorecard was developed by conducting an assessment of individual projects within the Modernization Program: Common Origination and Disbursement, Direct Loan Servicing Reengineering, Financial Management Systems Design, Financial Partners Transformation, and Portals. Arrows are used to represent the trend of the element as compared to the previous month's scorecard.










Legend				
<b>Assessment</b>	Red	●	Yellow	◐
				Green ○
<b>Trend</b>	No Change	■	Improved	↑
				Declined ↓


## MODERNIZATION PROGRAM SUMMARY

Measure	Common Origination Disbursement (COD)	Direct Loan Servicing Reengineering (DLSR)	Financial Management Systems Design (FMS)	Financial Management Transformation	Portals (EET and EAM)
Overall					
Scope					
Schedule Performance Against Work Performed					
Architecture					
Risk					
Quality					
Communication/Change Management					
Human Resources					
Commercial Off the Shelf Software (COTS)					










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Assessment	Red		Yellow		Green	
Trend	No Change		Improved		Declined	




## COMMON ORIGATION AND DISBURSEMENT

Assessment and Trend	Measure	Comments
<div>○ </div> <div>○ </div> <div>◐ </div> <div>○ </div> <div>○ </div> <div>○ </div> <div>○ </div> <div>○ </div> <div>○ </div>	<b>Overall</b>	The purpose of the overall assessment is to provide a simple and easy to understand way to consider the interaction of the individual project management process areas in arriving at an overall picture of the health of the work authorization.
	<b>Scope</b>	The TO scope has been defined and agreed to by the students channel and Modernization Partner.
	<b>Schedule Performance Against Work Performed</b>	The work within this project is on schedule against revised (client agreed to scope and schedule). The project activities have been occurring late versus the original project plan. Target end dates have been adjusted.
	<b>Architecture</b>	The Project is in full compliance with Modernization Blueprint baseline or target architecture standards. The project has not defined any architecture changes.
	<b>Risk</b>	Project risks to successfully execute the Task Order of work have been documented, and mitigation strategies have been defined.
	<b>Quality</b>	The Project is in the process of developing a documented quality plan and the project is complying with the requirements of the program plan, appropriate to the work required by the Task Order.
	<b>Communication/Change Management</b>	Communication strategies have been incorporated as part of the project's future work plan. A plan for reporting findings has been submitted and requires additional content development
	<b>Human Resources</b>	Human resource needs have been documented, approved, and available. Project team has the individual and group skills needed for the particular phase.
	<b>Commercial Off the Shelf Software (COTS)</b>	A review of COTS products has been incorporated into the project's work plan.



















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<b>Assessment</b>	Red	●	Yellow	◐	Green ○
<b>Trend</b>	No Change		Improved	↑	Declined ↓







## DIRECT LOAN SERVICING REENGINEERING

Assessment and Trend	Measure	Comments
<div>○ </div> <div>○ </div> <div>● </div> <div>○ </div> <div>○ </div> <div>○ </div> <div>○ </div> <div>○ </div> <div>○ </div>	<b>Overall</b>	The purpose of the overall assessment is to provide a simple and easy to understand way to consider the interaction of the individual project management process areas in arriving at an overall picture of the health of the work authorization.
	<b>Scope</b>	The scope has been defined and agreed to by the students channel and Modernization Partner.
	<b>Schedule Performance Against Work Performed</b>	The work within this project is on schedule against revised (client agreed to scope and schedule). The project activities have been occurring late versus the original project plan. Target end dates have been adjusted.
	<b>Architecture</b>	The Project is in full compliance with Modernization Blueprint baseline or target architecture standards. The project has not defined any architecture changes.
	<b>Risk</b>	Project risks to successfully execute the Task Order of work have been documented, and mitigation strategies have been defined.
	<b>Quality</b>	The Project is in the process of developing a documented quality plan and the project is complying with the requirements of the program plan, appropriate to the work required by the Task Order.
	<b>Communication/Change Management</b>	Communication strategies have been incorporated as part of the project's future work plan. A plan for reporting findings has been submitted and requires additional content development
	<b>Human Resources</b>	Human resource needs have been documented, approved, and available. Project team has the individual and group skills needed for the particular phase.
	<b>Commercial Off the Shelf Software (COTS)</b>	A review of COTS products has been incorporated into the project's work plan.










Legend				
<b>Assessment</b>	Red	●	Yellow	●
				Green ○
<b>Trend</b>	No Change		Improved	
			Declined	







## FINANCIAL MANAGEMENT SYSTEM DESIGN (FMS)

Assessment and Trend	Measure	Comments
 	<b>Overall</b>	The purpose of the overall assessment is to provide a simple and easy to understand way to consider the interaction of the individual project management process areas in arriving at an overall picture of the health of the work authorization.
 	<b>Scope</b>	The scope has been defined, requirements are documented and authorized by the SFA, Schools Channel, and Modernization Partner.
 	<b>Schedule Performance Against Work Performed</b>	The project is currently meeting Task Order milestones. All deliverables have been submitted on time and we are currently awaiting response from SFA for the last two deliverables.
 	<b>Architecture</b>	The project is in full compliance with Modernization Blueprint baseline or target architecture standards. The project has not defined any architecture changes.
 	<b>Risk</b>	The project risks to successfully execute the Task Order has been identified, documented and prioritized and risk mitigation strategies are in place to deal with contingencies and unknowns.
 	<b>Quality</b>	The project is in the process of developing a documented Quality Plan and is complying with the requirements of the Quality Plan.
 	<b>Communication/Change Management</b>	The team has facilitated community focus groups to determine the needs and expectations of the customers as well as worked closely with the Organization Transformation team dedicated to the Schools Channel in the early stages of the project. Additionally, the team has worked with SFA leadership to communicate project goals with the Education community via conference presentations and the Updated Modernization Blueprint.
 	<b>Human Resources</b>	Human resource needs have been documented, approved, and fulfilled. The project team has the individual and group skills needed for the current phase.
 	<b>Commercial Off the Shelf Software (COTS)</b>	A review of COTS products has been incorporated into the project's work plan. A review of COTS products has been incorporated into the project's work plan.

Legend						
Assessment	Red		Yellow		Green	
Trend	No Change		Improved		Declined	



















## FINANCIAL PARTNERS TRANSFORMATION





Assessment and Trend	Measure	Comments
	<b>Overall</b>	The project is on schedule and project start-up activities are near completion.
	<b>Scope</b>	The scope of the Financial Partners Transformation program and Modernization Partner support have been defined and agreed to by all parties.
	<b>Schedule Performance Against Work Performed</b>	The project is on schedule in achieving milestones. However, the delivery date for the Initial Project Management Plan, has been changed from 4/28 to 5/15. This change was necessary due to a delayed start date as a result of problems with obtaining approval of the task order. The change to the delivery date has been discussed and approved by Barry Morrow.
	<b>Architecture</b>	There will be an assessment of architectures.
	<b>Risk</b>	Project risks to successfully execute the Task Order of work have been documented. Mitigation strategies need to be defined and executed.
	<b>Quality</b>	The project is complying with the requirements of the program plan, appropriate to the work required by the Task Order.
	<b>Communication/Change Management</b>	Communication and change management strategies have been incorporated as part of the project's current and future work plan.
	<b>Human Resources</b>	Human resource needs have been documented, approved, and made available. However, one human resource need for the Employee Transformation (Development) team remains outstanding.
	<b>Commercial Off the Shelf Software (COTS)</b>	NA

Legend					
<b>Assessment</b>	Red		Yellow		Green 
<b>Trend</b>	No Change		Improved		Declined 



## PORTALS

Assessment and Trend	Measure	Comments
 	<b>Overall</b>	The purpose of the overall assessment is to provide a simple and easy to understand way to consider the interaction of the individual project management process areas in arriving at an overall picture of the health of the work authorization.
 	<b>Scope</b>	The scope management effort in the Portals environment is an area of challenge. The scope of the Schools Portal continues to be refined by the Schools channel and the CIO development team. The SFA Intranet project is progressing, but because the Intranet provides information across each SFA organization entity, clear plans by each area for content and design are still being captured and finalized.
 	<b>Schedule Performance Against Work Performed</b>	To date the Schools Portal, IFAP re-platform and SFA Intranet have achieved all milestones on schedule and within thresholds. All changes to delivery dates are being directed through the appropriate review and approval process.
 	<b>Architecture</b>	The Project defines the Modernization Blueprint baseline or target architecture standards. The School portal and SFA Intranet Release 2 are being built on the accepted enterprise architecture standards. The content management process to support these solutions is also being built using the enterprise architecture standard.
 	<b>Risk</b>	Project risks to successfully execute the Schools Portal and IFAP re-platform have been documented and mitigation strategies are currently being defined and will be executed. The key risk area is the commitment of a date to the Schools community in combination with decisions regarding procurement delaying the planned schedule for hardware and software acquisition.
 	<b>Quality</b>	The project is complying with the requirements of the program plan, appropriate to the work required by the Task Orders.
 	<b>Communication/Change Management</b>	Communication and change management strategies have been incorporated as part of the project's current and future work plan.
 	<b>Human Resources</b>	Human resource needs have been documented, approved, and available. Project team has the individual and group skills needed.
 	<b>Commercial Off the Shelf Software (COTS)</b>	The project has developed recommendations on the use of COTS products.

Legend				
<b>Assessment</b>	Red		Yellow	
				Green 
<b>Trend</b>	No Change		Improved	Declined

## 5.0 Key Accomplishments This Month and Plans For Next Month

During the month, the project teams accomplished the following:

### COMMON ORIGINATION AND DISBURSEMENT (COD)

Work Completed this Month:

- Worked with Kay to redefine high level attributes of conceptual design, including preliminary plans for incorporating community feedback
- Assisted with preparing updates/ information on initiative for Blueprint, Blueprint Town Hall meeting and several conferences with community members (e.g.: NASFAA)

Planned Work in Progress:

- Finalize TO 19, COD Solution Selection and Design (Phase II)
- Develop approach for bringing in school representatives to gather focused feedback on COD, and performance-based funding, specifically

Work Projected for next Month:

- Conduct site visits with potential systems providers to evaluate as potential solutions to COD.
- Begin developing mid-level COD business requirements

## **DIRECT LOAN SERVICING REENGINEERING (DLSR)**

### Work Completed this Month:

- Continued review and discussion of the CDS retirement business case with other channels
- Scheduled sponsor review of eServicing conceptual design and business case
- Finalized Modernization Blueprint updates for Student channel

### Planned Work In Progress:

- N/A

### Work Projected for next Month:

- Produce Reengineering Options deliverable
- Produce final CDS Retirement business case

## **FINANCIAL MANAGEMENT SYSTEM DESIGN (FMS)**

### Work Completed this Month:

- Delivered FMS Implementation Plan deliverable (including work plan and final deliverable/working product list) on April 28, 2000.
- Delivered Oracle Licensing Pricing Analysis on April 7, 2000. Response from client has not been received.
- Delivered FMS Business Case on April 28, 2000.
- Began to define the technical infrastructure for development.
- Finalized Pricing/Cost Model for Phase II effort.
- Finalized Task Order/subcontractor agreement with SFA/Oracle.
- Staffed Project. Oriented new team members.
- Obtained ability to perform FMS development in the VDC-provided development environment for 7 of 30 team members.

### Planned Work in Progress:

- Establish office and development environment.
- Prepare and conduct additional project orientation/training sessions.
- Complete 11 working products due in April; delayed because of staffing.

### Work Projected for next Month:

- Deliver Solution Demo 1 (Phase II).
- Deliver Contractor Monthly Status Report.

## **FINANCIAL PARTNERS TRANSFORMATION (FPT)**

### Work Completed this Month:

- Drafted executive summary for FPT Program.
- Presented the April 28 FPT Status Report Package to Barry Morrow and Team Leads.
- Revised FPT Program Plan to reflect changes to projects and team lead responsibilities.
- Implemented project management approach.
- Developed and distributed work plan template to assist FP team leads in developing their detailed project work plans.
- Drafted and distributed Deliverable Tracking Report.
- Conducted weekly team lead meetings.

### Planned Work In Progress:

- N/A

### Work Projected for next Month:

- Complete and obtain approval of the FP Core Processes Current Environment Assessment.
- Begin work on the FP Core Processes Reengineering Options and Analysis.
- Develop approach and select/develop tool for Change Readiness Survey.
- Refine use of project management tools.
- Finalize project management deliverable.
- Work with team leads to customize and finalize their work plans.
- Work with team leads on reporting accurate and informative status.

## PORTALS

### Work Completed this Month:

- Ombudsman - Detailed designs of the revised system have been completed and ready for management review. This design shows data and screens that will be used by the specialists.
- Data Warehouse - Conducted Project Kickoff for Implementation Planning work
- Integrated Architecture Development - Conducted Project Kickoff for Configuration Gathering information
- School Portal - Business Requirements confirmed with School Channel project team members
- IFAP – Business Requirements confirmed with School Channel project team members
- Intranet – Completed employee services, CIO and SFA Communications sections of Intranet as scheduled.
- Content Management – completed content management processes, role descriptions and organization recommendations

### Planned Work In Progress:

- N/A

### Work Projected for next Month:

- Initiate Security Risk Assessments of Legacy Systems
- Ombudsman – Develop Seibel CRM solution and begin testing
- Data Warehouse – Conduct discussions with NSLDS, CFO and Performance Measurement areas to scope their Data Warehouse implementations
- Integrated Architecture – Align architecture build to a business solution (Internet to School Portal and Intranet, Data Warehouse to NSLDS, EAI to application schedule). Drive architecture build in support of these initiatives
- School Portal and IFAP – Begin design and development work
- Intranet – Build out the remainder of site and gather content to post to site as SFA business units make it available
- Content Management – Install Interwoven and begin testing tool against processes and role descriptions developed

## **PROGRAM MANAGEMENT OFFICE**

### Work Completed this Month:

- Delivered and gained acceptance of the Acquisition Strategy Update.
- Completed development of the Legacy Contract Transition Plan.
- Submitted 5 Task Order proposals:
  - TO 7 – Business Planning Support
  - TO 11 Mod 1 – Ombudsman Solution Delivery
  - TO 13 – Quick Response
  - TO 13 WO 2 – RFMS
  - TO 21 – Data Warehouse
- Completed Security documentation on 31 individuals
- Provided technical documentation and transitioned IRB database maintenance and responsibility to client.
- Introduced CMM Level 2 requirements to program.
- Delivered Monthly Program Report to client.
- Rolled out new program reporting requirements.

### Planned Work in Progress:

- Continue effort to complete the Legacy Contract Transition Plan.
- Support development of the CDS Retirement Acquisition Approach.
- Support planning for the Quarterly Contractor Executive Meeting (5/8/00).
- Continue effort to complete in progress Task Order proposals.
- Continue effort to have each Modernization Partner staff member execute a Notice of Criminal Liability under the Privacy Act statement and an OF-306 Declaration for Federal Employment form – 137 of 156 complete.
- Continue negotiation efforts with subcontractors - 11 signed, 5 in final stages, 4 in progress
- Initiate planning efforts for move to new site (370 L'Enfant Plaza)
- Assess project workplanning tools (Microsoft Project 2000 and ABT Project Workbench). Were able to contact developers of Government engagement toolkits to understand functionality and benefits of Microsoft Project 2000.
- Trial run of new reporting process was not completed. Expect to complete an execution of the new reporting process in May.
- Continue managing Task Orders through completion.

### Work Projected for next Month:

- Complete delivery and acceptance of the Legacy Contract Transition Plan.
- Continue to support development of the CDS Retirement Acquisition Approach.
- Attend the Quarterly Contractor Executive Meeting (5/8/00).
- Submit remainder of in-progress Task Order proposals.

- Continue effort to have each Modernization Partner staff member execute a Notice of Criminal Liability under the Privacy Act statement and an OF-306 Declaration for Federal Employment form.
- Continue negotiation efforts with subcontractors.
- Continue planning efforts for move to new site (370 L'Enfant Plaza)
- Execute new reporting processes.
- Develop and begin implementing a plan to install tools that will support program's executive reporting needs.



## **ORGANIZATION TRANSFORMATION**

### Work Completed this Month:

- Re-organization of design packages, including functional descriptions and staffing patterns, completed for Schools.

### Planned Work in Progress:

- Completion of outstanding position descriptions to complete Wave 2 design.

### Work Projected for next Month:

- Reach closure on SFA Organization Transformation project. Define/scope new task orders for on-going organization implementation support under Modernization Partner contract.

## **6.0 Appendix**

Attached are deliverables logs which indicate the status of the deliverable as In Progress, Delivered, or Accepted.